



## Believing in the future of Liston College

### Include a gift in your Will

You've already made a difference in the lives of those around you through the years – to your family, your friends and those you've worked with. We believe that generosity is part of Liston College's nearly 50<sup>th</sup> year tradition of giving. Like you, our community understands and believes in the value of a quality education.

As you think about your connection with Liston College and your plans for the future, we invite you to consider leaving a gift to the future students of Liston in your Will.

Leaving a gift in your Will is often the best way of making a gift that you may not be able to make during your lifetime. Making a bequest in your Will is your plan for the future.

This is a brief introduction to bequests however, we recommend that you seek legal advice before completing your Will and that you consider your family and loved ones when planning your Will.

#### How to Include a Gift to the Liston College Foundation Fund in your Will

Of course, families come first when you make your estate plans, but there is usually room in these plans for the causes and charities that matter most to you. If helping to provide opportunities and to empower young people through education is such a cause, then giving to the Liston College Foundation Fund (LCFF) through your Will can be a very special way to create a legacy that transcends time.

We believe that any bequest you decide to make, irrelevant of size, is a unique and individual gift. When it comes to how you would like your bequest to be used, the choice is yours – a scholarship in your name, a gift towards a specific programme at Liston College (for example, development of sport, music, cultural performance or a specific core subject), – or you may decide to leave it to the discretion of the College to direct your gift towards a future need or priority for Liston.

Whatever area your gift supports, you have the satisfaction of knowing that you have added to the quality of life for those who live after you.

## Liston College Foundation Fund (LCFF) is a Sub Fund of Auckland Foundation

Auckland Foundation, the community foundation for Auckland, has a charitable structure that encourages and facilitates effective giving, and it manages a number of Funds. Auckland Foundation manages the Liston College Foundation Fund (LCFF), serving as the back office and taking instruction from LCFF's Advisory Committee. All accounting and compliance is taken care of by Auckland Foundation. Fundraising projects and communication with donors are managed by Liston College.

To view information on Auckland Foundation and its relationship with the Funds it manages go to <https://www.aucklandfoundation.org.nz/our-funds> The Funds are listed in alphabetical order, with the Liston College Foundation Fund about half way down the page.

## Types of Gift to consider making to the Liston College Foundation Fund

You can make different types of gifts in your Will to the Liston College Foundation Fund including:

- A residuary gift – what is left of your estate once all other gifts and costs have been paid
- A pecuniary gift – a gift of a specific amount
- A percentage gift – a specific proportion of your estate
- A gift of assets – gifts of assets such as shares, property or real estate

### 1. Residuary Gift in Will

"I give to the Liston College Foundation Fund for its general purposes (or name specific purpose) all (or stated fraction) of the rest, residue and remainder of my estate whether real or personal and the receipt of Auckland Foundation, as manager of the Liston College Foundation Fund, will be sufficient discharge to my Executor/Trustee."

### 2. Specified Gift in Will

"I give to the Liston College Foundation Fund the sum of \$\_\_\_\_\_ (or stated fraction) to be used for the purposes of (name specific purpose) and the receipt of Auckland Foundation, as manager of the Liston College Foundation Fund, will be sufficient discharge to my Executor/Trustee"

### 3. Unspecified Gift in Will

"I give to the Liston College Foundation Fund the sum of \$\_\_\_\_\_ (or stated fraction) to be used for its general purposes and the receipt of Auckland Foundation, as manager of the Liston College Foundation Fund, will be sufficient discharge to my Executor/Trustee"

#### 4. Gift of Assets in Will

“I give to the Liston College Foundation Fund (insert the details of your gift) and I direct that the receipt of the Auckland Foundation, as manager of the Liston College Foundation Fund, will be sufficient discharge to my Executor/Trustee.”

#### Unspecified/Specific Gifts

An unspecified gift, because of its flexibility, allows Liston College to meet the changing needs of the future. Unspecified gifts will be entrusted to Auckland Foundation to invest on behalf of Liston College. Control of how the funds are distributed is with the Liston College Foundation Fund’s Advisory Committee, and Auckland Foundation can’t/won’t make any charitable distributions without being explicitly instructed to do so by the LCFF Advisory Committee.

If you request that your gift is used for a specific purpose, the College will make every effort to respect your wishes. If circumstances and priorities change over the years and it’s not possible to follow your wishes, Liston College will consult with your Executor or family and use your gift for the most relevant related purpose.

We encourage you to seek legal advice and to consider your family and loved ones when writing your Will. We believe that you can be very proud of your decision to leave a bequest to the Liston College Foundation Fund and we encourage you to talk about your plans with your family.

#### Thank You

Thank you for considering making a bequest to the Liston College Foundation Fund to support the education of young people in the future.

Please let us know if you have decided to leave a bequest to the College so that we can make sure that we understand your wishes and how we might acknowledge your gift. We would also like to keep you up to date with our programmes and how the support of donors impacts on the lives of young people. All correspondence and information is treated in the strictest confidence. Any discussions that we have with you, and your decision to make a bequest, will be kept confidential unless you say otherwise.

Please contact me if you have any questions about how to leave a gift to the Liston College Foundation Fund in your Will or if you would like to support the College and its students in any other way.

Thank you again for your generosity and interest.

#### Contact details:

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